



## HOW FLOWBIRD USED PIPEDRIVE AND ACTIVEDEMAND TO INCREASE BUSINESS BY 23%

- Since they started using Pipedrive and ActiveDEMAND, Flowbird have had a 23% increase in business

When Jason Rainbird founded Flowbird in 2013 as a CRM implementation consultancy, he set himself an ambitious goal: bridging the gap between sales and marketing.

Flowbird offers its clients a complete marketing and CRM implementation service. Whether a client needs a complete overhaul of their marketing and sales process or some more specialized strategic direction, Flowbird can help their clients develop more efficient and sustainable programs.

As a CRM implementation expert with a solid track record in sales and marketing, Jason knew that one of the key challenges facing many organizations lies in how to get their sales and marketing teams working in sync.

Establishing a successful agency in such a highly specialized field hasn't always been easy going, but through a combination of judicious trial and error and really listening to their clients' needs, the UK-based consultancy has hit upon a suite of tools and partners that help their customers automate important business functions.

## **Flowbird's problem**

In the beginning, Flowbird tried using only marketing systems to serve their clients' needs and used a variety of software to achieve this aim. But they soon ran into a problem.

“We initially set up Flowbird as a CRM implementation consultancy before introducing marketing automation two years ago. We started out by using two well-known marketing automation products but immediately began getting negative responses from our clients,” says Jason.

What he found was that, while these marketing tools contained a CRM sub-system, they really weren't fit for purpose. Flowbird would have to find a specialized sales CRM in addition to a marketing platform. They would need to complicate things in order to simplify them.

“While these systems professed to be CRMs, they are not really CRMs, certainly not in the way I would know them from a salesperson's perspective. They were not easy to use. They were not slick.”

Flowbird faced a bit of a dilemma. It was becoming very clear that there was no single system that would satisfy their clients' needs. They needed to find a way to bridge that gap between sales and marketing.

## **Flowbird's solution**

In order to take a leap forward, Flowbird first needed to take a step back.

This meant they had to choose a marketing system that would easily integrate with any number of CRMs first, then choose the CRM. After testing various offerings Flowbird landed on ActiveDEMAND, a platform that offers streamlined campaign management, campaign recipes, and attribution reporting. Flowbird chose ActiveDEMAND because it offered native integration with Pipedrive, was feature-rich, and affordably priced. It was an easy choice to offer as a combined marketing and sales stack for many customers.

Once their existing clients were successfully onboarded to ActiveDEMAND, Jason decided that a slight pivot in focus was required before continuing.

“I decided that I wanted to get back to my real experience, which was in CRM. I'd known Pipedrive for many years, I'd played around with it, but now I decided that it would be our core offering. So I signed up, started using it and since then we've been getting some really good feedback from clients.

“I like to explain it to people like this. We’re building a house, which is the marketing automation aspect of the service, but until this pivot, we’d been building it without putting in solid foundations. And that’s what the CRM is. The structure, the foundation, is actually the CRM system.”

Thanks to the Pipedrive and ActiveDEMAND integration, Flowbird has seen a 23% increase in business.

“We now have the ability to immediately trigger long-term nurture processes directly from inside Pipedrive whilst still on the phone to the contact,” says Jason. “We can regularly get in touch with contacts and then they come back to us at the appropriate time.

“Before, we would have simply created a follow-up task and probably have lost the business before getting back to them.”

## **Practicing what you preach**

The perfect way to stress-test this dual software approach was to start using the system on Flowbird’s own sales process which is quite unique. Apart from occasional forays into networking and attending events, Flowbird’s customer acquisition process is almost entirely based on referrals from existing clients, which means they’re certainly doing something right.

Flowbird began setting up their sales process by creating two sales funnels: a core funnel and a long-term nurture (LTN) funnel. Jason splits the two funnels, keeping pre-prospect (LTN) contacts in ActiveDEMAND and sales-ready (core) prospects in Pipedrive.

“The idea behind this is that if I can’t sell you today, I want you out of my pipeline because I want an active pipeline. Once I’ve moved a prospect into the LTN pipeline, the marketing automation platform can take over and when they’re ready, we’ll flip them back over into the active pipeline,” says Jason.

This means the pipeline stays clean, while the sales team has peace of mind knowing that the long-term prospects are being looked after.

To be successful, this entire system needs to be absolutely seamless.

ActiveDEMAND helps Flowbird to manage their email marketing campaigns, lead nurturing, and lead scoring. In addition to email, Flowbird uses SMS and Twitter to stay in touch with long-term prospects.

The moment a prospect moves from LTN to active, an activity is created in Pipedrive and a salesperson will get in touch with the potential customer.

Lead scoring is a pivotal part of sales success and Jason explains that if a prospect shows no activity for a long period of time, i.e. they don't open emails or visit the website, a notification is triggered and a human will step in, usually in the form of a salesperson picking up the phone and contacting the prospect. By setting how various activities impact a lead score, and then setting up different automations based on that score, users can be nurtured automatically or sent up to sales when they're ready.

Flowbird takes a cascading approach to the marketing and email flow, depending on where the prospect is in the process. This has allowed them to develop a deep understanding of what sort of messaging and frequency works best to move someone from prospect to paying client.

### **Putting the process into action**

When Flowbird signs up a new client, they deliver a deep and wide-ranging service, which starts by building out the entire sales and marketing structure, then moves on to connecting that structure to sales.

“We take people through an entire onboarding process. We might tell them that we have ten emails ready for their personal process and we've written the copy for them as well. While we find that clients might go back and tweak the copy a bit, they generally stick with our template,” says Jason.

He's also a great believer in text-based rather than 'glossy' emails. The editing options available in ActiveDEMAND emails helps users to customize the text and content in these emails to offer that personal touch at scale.

“We've found from experience that, while one or two glossy emails are fine, generally we want to send real emails from real people.”

Different clients have different needs, and the system Flowbird has created is set up to be as flexible as possible.

“We have clients who, after the initial set-up, prefer to run on their own, and we have others who like us to be on board every step of the way, through every campaign they do.”

Many customers have to be upgraded or migrated from an existing CRM, and Jason is a huge fan of the Import2 tool to facilitate this process smoothly.

He says: “I just love that. It saves so much aggro. It's so quick to back up the database, load it up and there it is. We can now extract it, clean it up a bit and we're ready to go.”

## **Looking to the future**

Jason is keen on really putting Pipedrive through its paces and sees the workflow automation system as one of, if not the, most important ways to deliver an even better service to his clients.

“We have one client we've started working with who are creating their own automated quoting integration for Pipedrive. A second client has built great automation on lost deals so that the entire system is working really well for us,” says Jason.

## **Offering the complete solution**

We'll leave the final word to Jason: “When a client comes to us I make it clear that what we offer is the complete solution. This is not just a CRM system where you track your sales. We are literally bridging the gap between sales and marketing so that your strategies are perfectly aligned.”

“The system we've created takes CRM to the next level. You don't need to pay someone a massive amount of money to have a really slick solution. If you're an SME with about 10-15 employees, losing even one lead can be a serious problem. We'll make sure that no one falls through the cracks. By combining Pipedrive and ActiveDEMAND, we believe we've created the perfect system.”

You can find ActiveDEMAND on the Pipedrive Marketplace, along with dozens of integrations that can help you boost your sales process and automate your tasks.

